ORAL PRESENTATION TRAINING

AGENDA

- ORAL PRESENTATION OVERVIEW
- NAWCTSD USES
- FAR REQUIREMENTS
- SECTION L REQUIREMENTS
- SECTION M EVALUATION
- NAWCTSD ORAL PRESENTATION PROCEDURES
- TEAM MEMBER RESPONSIBILITES
- EXPERIENCES/LESSONS LEARNED

ORAL PRESENTATION DEFINITION

- Oral Presentation signifies an oral submission of information to the Government that it will use, instead of written technical or management proposal, to evaluate an offeror’s understanding of the Government’s requirements.

ORAL PRESENTATION - DISCUSSION

- Contracting Officer’s fear that oral presentations would or could constitute discussions with in the meaning of FAR and therefore preclude award without discussions.
- The Oral presentation is an oral examination and does not constitute discussions with in meaning of FAR.
- Discussions allows an offeror to furnish information about its proposal or to change its proposal.

ADVANTAGES

- Oral Presentations Can Transmit a Great Deal of Information in a Relatively Short Time.
- Oral Presentations Allow the Evaluators to Test the Understanding of the Offeror’s Key Personnel.
- Allows a Real-Time Interactive Dialog With the Offerors
- Oral Presentations May Be Less Expensive Than a Written Proposal.
- Can Reduce the Acquisition Cycle and Staffing Requirements

ORAL PRESENTATION TYPES

- BRIEFING – One Way Communication
- SAMPLE TASK – Provide a Solution to a Task

NAWCTSD USE

- Not Typically Used for Either Lower Complexity or Very Complex Acquisitions
- Used Almost Exclusively for Best Value Actions
- Multiple Award Contracts
  - Training Systems Contract
  - Fielded Training Systems Services (Limited Use)
  - STRICOM Omnibus Contract
- Reduced PALT by 65%. Typical Award Takes 45-60 Days From RFP

NAWCTSD USE

- Services
  - Contractor Operations and Maintenance Services
  - Engineering Services
  - Trainer Moves
- Supply
  - Instructional Systems Development
  - Training Systems
  - Training System Modification Acquisitions
- Oral Presentations Can be Based on the Following:
  - Performance Specifications
  - Functional Specifications
  - Statement of Objectives

FAR REQUIREMENTS

- FAR 15.102
  - Oral Presentations can Augment or Substitute for Written Information
  - Same Restrictions as for Written Information (Timelines and Content)
  - Certifications, Representations, and Signed Offer Still Required in Writing
  - A Pre-Recorded Video Presentation is NOT an Oral Presentation – (Can Be Used)

FAR REQUIREMENTS

- FAR 15.102
  - Determination to Use Should Consider
    - Ability to Evaluate the Information
    - Need to Incorporate Proposal into Contract
    - Impact on Acquisition Efficiency
    - Impact on Small Businesses (e.g. cost).

FAR REQUIREMENTS

- FAR 15.102
  - Solicitation
    - Type of Information Required
    - Requirements of Presenting Personnel
    - Requirements/Limits on Written Materials
    - Location/Date/Time
    - Amount of Time Allowed
    - Scope and Content of Exchanges

FAR REQUIREMENTS

- FAR 15.102
  - The Contracting Officer Shall Maintain a Record of Oral Presentations to Document the Source Selection Decision.
  - The Method and Level of Detail Shall be at the Discretion of the SSA.
  - A Copy of the Record May be Provided to the Offeror.

ORAL PRESENTATION SCHEDULING

- FAR Does Not Prescribe Procedures for Scheduling Oral Presentations.
- The Presentation Schedule Can Follow an Order Established by Drawing Lots in Random.

SECTION L - REQUIREMENTS

- Proposal Submission Includes (Provided Approximately 1 Week Prior To Orals)
  - Proposal Presentation Slides
  - Past Performance Information
  - Section B, Supplies, Services, and Prices
  - Section K and L Certifications, Reps, Information
  - Acceptance of RFP, and any Admendments
  - Government Agency Information
  - Exceptions, Deviations, and Waivers

SECTION L - REQUIREMENTS

- Instructions to Offerors Must Describe:
  - Format and Content of the Offer (Proposal)
  - Required Written Information, i.e., Prices or Cost Documentation,* References, Resumes
  - Purpose, Format, and Content of Oral Presentation

* Cost Documentation Required You will need to do a Cost Realism Analysis.

SECTION L - ORAL PRESENTATION REQUIREMENTS

- Ground Rules
  - Presentation Slides
    - Submitted as Part of the Written Portion of the Proposal
    - Specify Restrictions on the Presentation Media Used
    - Draft Slides May be Submitted Earlier
    - Usually No Limit on the Number of Slides
    - Contractor's Permitted to Point Out Minor Discrepancies
    - Contractor NOT Permitted to Revise its Proposal
    - Slides Are Not Stand Alone Documents

SECTION L - ORAL PRESENTATION REQUIREMENTS

- Ground Rules
  - Requirements of Contractor Participants
    - Briefing Personnel Requirements
    - Subcontractors
    - Clearance Requirements (Foreign Subs?)
  - Government Facilities
    - Government Provides Overhead Projector?
    - Conference Room, Podium, etc.

SECTION L - ORAL PRESENTATION REQUIREMENTS

- Ground Rules (Continued)
  - Number of Participants/Observers - PCO's Have Different Philosophy's on This
  - Schedule for Presentations (Dates)
  - Time Line for Presentations
  - Clarification
    - Follows Presentation
    - NOT Discussions
  - Oral Presentations Video Taped
    - Copy Provided to Presenters at Conclusion
    - Compact Disk or Tape

SECTION L - SAMPLE ORAL PROPOSAL DISCUSSION POINTS

- Introduction
- The Component Activities of the Work
- Schedule for Starting and Completing the Work
- Allocations of Resources
- Risk Assessment of the Program
- Assessment of Organizational Elements, Subcontractors, and Persons to the Activities
- Conclusion

SECTION L - SAMPLE SUPPLY PROPOSAL FACTOR REQUIREMENTS

- PROGRAM MANAGEMENT
  - PM Plan
  - Schedule
  - Risk Management
- PAST PERFORMANCE
- TECHNICAL APPROACH
  - Simulator Design
  - System Integration
  - Test and Evaluation
  - Facility Preparation
- LOGISTICS
  - Reliability, Maintainability, and Supportability.
  - Data Requirements.

SECTION L - SAMPLE INSTRUCTIONAL SYSTEMS DEVELOPMENT FACTORS

- PROGRAM MANAGEMENT
  - Management Structure
    - Organizational Chart
    - Subcontracting
  - Management Controls
    - Management of the Contract
    - Quality Control
    - Training Systems Status Reporting
  - Personnel
    - Availability of Personnel
    - Key Personnel Labor Categories (Experience)
- TECHNICAL APPROACH
- PAST PERFORMANCE

SECTION L - SAMPLE SEVICES PROPOSAL FACTOR REQUIREMENTS

- TECHNICAL/MANAGEMENT
  - Manning and Organization
    - On-Site Organizational Work Force
    - Key Personnel
    - Back-Up Support Plan
    - Organizational Chart
  - Management of the Contract
    - Management Experience
    - Management Policies for a Stable Work Force
    - Quality Assurance Surveillance Plan
  - Technical Approach
    - Contractor Operations and Maintenance Plan
    - Supply Support Requirements
- PAST PERFORMANCE

SECTION L - SAMPLE SEVICES MULTIPLE AWARD REQUIREMENTS

- TECHNICAL/MANAGEMENT
  - Manning and Organization
    - On-Site Organizational Work Force
    - Key Personnel
    - Back-Up Support Plan
    - Organizational Chart
  - Technical Approach
    - Describe the Approach That Will be Used to Accomplish the Task Order
    - Unique Company Capabilities
- PAST PERFORMANCE
  - Show Cause Notices
  - Cure Notices
  - Terminations

SECTION M - EVALUATION FACTORS SAMPLE

- SIMILAR TO NORMAL ACQUISITION
  - TECHNICAL (Approach, ILS, PM)
  - Cost - CAIV
  - Technical>>Cost
  - Technical = Past Performance
  - Technical Approach>Logistics> Program Management
  - Proposal Risk

SECTION M - EVALUATION FACTORS

- REQUIREMENT: SOO and Section L
- EVALUATION: Determine whether the offeror meets requirements, is offering an enhancement (STRENGTH), has a flaw in its proposal (WEAKNESS), has a material failure (DEFICIENCY).
- Strengths/Weaknesses must be directly related to the Section M evaluation criteria

SECTION M - EVALUATION FACTORS

- Technical includes Proposal Rating and Risk Rating
  - Proposal Rating - How well approach meets solicitation requirements
  - Risk Rating - Potential impacts of approach on performance, schedule, and cost

NAWCTSD ORAL PRESENTATIONS

- Slides Provided As Part of Proposal
- Normally Two Hours + Breaks
- No or Limited Questions During Presentations (PCO Determines)
- Government Meeting After Presentation to Develop Clarification Questions
- Establish Timeframe for Clarification (One Hour?)

ORAL PRESENTATION SAMPLE TIMETABLE

- **0800 - 0830 CONTRACTOR SET-UP**
- **0830 - 1100 CONTRACTOR ORAL PRESENTATION**
- **1100 - 1230 GOV'T TEAM REVIEW OF PRESENTATION**
- **1230 - 1300 GOV'T PRESENTS CLARIFICATION Q'S**
- **1300- 1400 KR REVIEWS GOV'T Q'S**
- **1400-1500 KR RESPONDS TO GOV'T Q'S**

NAWCTSD ORAL PRESENTATIONS

- Evaluators Utilize Evaluation Worksheets During Presentations
- Evaluations Done Immediately Following Oral Presentation/Clarification - Individual Effort + Group Review - Under Control & Guidance of Team Leader/SSEB Chair
- Can Review Tape Or Compact Disk as Required to Assure Fairness to Offeror
- PER Prepared Based on Evaluator’s Assessments

ORAL PRESENTATIONS CLARIFICATION

- Clarification Session
  - Provides Better Insight Into the Depth and Breath of the Offeror's Understanding of the Requirements
  - Ensures Government Understanding of the Proposal and Obtain Real-Time Resolution of Most Proposal Issues
  - Broad Leeway in Asking for Information Relating to Presented Information
  - Can Request Contractor to Explain Terms/Language Used During Presentation
  - Can Request Contractor to Expand on Information Presented
  - Cannot Allow Contractor to Revise Proposal
  - Offeror's Cannot Respond at a Later Date
  - Do NOT Allow Offeror's to Ask Questions to Evaluators
  - All Offerors Must be Treated Fairly

ORAL PRESENTATION DEBRIEFING

- Be Prepared to Conduct a Debriefing
- Offerors' Will be Emotionally Unprepared That They Did Not Get the Award
- Explain Findings in General Terms
- Do NOT Provide a Comprehensive Critique of the Oral Presentation
- State the Findings and Reasonings – DO NOT Make a Slide-by-Slide Analysis.

MAJOR TEAM MEMBERS

Important Factor

- In Order for a Oral Presentation Evaluation to Be Successful, You MUST Have a Knowledgeable and Dedicated Evaluation Team. Each Member Has to Be a Participant in Each Presentation and Be Committed to the Process.

MAJOR TEAM MEMBERS

- Source Selection Authority (If available)
- Source Selection Advisory Council/Competitive Award Panel
  - Evaluation Team
    - Contracting Officer
    - Contract Specialist
    - Program Management
    - Engineering
    - Logistics
    - Subject Matter Experts (If applicable)

MAJOR TEAM MEMBER RESPONSIBILITIES

- **OVERALL RESPONSIBILITIES VERY SIMILAR TO NORMAL BEST VALUE ACQUISITION**

CAP/SSAC

- Provide Guidance to SSEB Chair
- Direct Preparation of SSEB Evaluation Plan
- Resolve Source Selection Issues
- Provide Recommendation to SSA (Proposal Analysis Report)

MAJOR TEAM MEMBER RESPONSIBILITIES

TEAM LEADER/SSEB CHAIR

- Provide Training/Guidance to Team on Evaluation Procedures
  - Lead Factor/Sub-Factor Discussions
  - Dictate Format/Content of Input
- Prepare Consolidated Findings to the Chairperson
- SSEB Chair Prepares Proposal Evaluation Report (PER)
  - Assign Rating to Each Factor Together with a Discussion Supporting that Rating
  - Consolidate Inputs/Final Rating Recommendation
  - Provide Written Report to SSAC
  - Provide Oral Briefing to SSAC

MAJOR TEAM MEMBER RESPONSIBILITIES

TECHNICAL EVALUATORS

- Review Slides Prior To Oral Presentations
- Read Section L and M Prior To Oral Presentations
- Take Notes During Oral Presentations
  - Clarification Questions
  - Initial Proposal Evaluation Thoughts
- Participate In Clarification Process
- Follow Team Leader Guidance On Evaluation
  - Discuss Findings As A Team
  - Complete Evaluation Forms Provided In SSP/PEP
  - Strong Points, Weak Points, Other Comments with Rationale

MAJOR TEAM MEMBER RESPONSIBILITIES

Procuring Contracting Officer

- Enforces Ground Rules in Accordance With the RFP
- Ensures Presentation is in Accordance With the RFP
- Provides Evaluator Training On Oral Presentation Procedures (May be Delegated)
- Approve Request For Proposal
- Lead Clarification Sessions With Evaluators and Contractors (May be Delegated)
- Serves as Source Selection Authority
- Prepare Source Selection Decision
- Signs Contract

MAJOR TEAM MEMBER RESPONSIBILITIES

Contract Specialist

- Supports the Acquisition Process
- Reviews Cost/Price Proposals and Prepares Report
- Conducts Past Performance Review (If Applicable)
- Prepares Business Clearance
- Prepares Award Documentation
- Obtains Necessary Approvals

MAJOR TEAM MEMBER RESPONSIBILITIES

Contract Specialist

- Serves as the Administrator-Recorder
- Arranges for the Facilities, i.e., Chairs, Tables, Paper, Pens, etc.
- Arranges Audio Visual
- Arranges for Visiting Presenters (Security)
- Security Officer
- Makes Sure Evaluators Have Everything They Need

SAMPLE AWARD SCHEDULE**

- Request for Proposal - 18 May 00
- Proposal - 23 Jun 00
- Oral Presentations - 06/07 Jul 00
- Tech Eval - 17 Jul 00
- SSA Decision/Clear. - 21Jul 00
- Award - 25 Jul 00
- **Schedule Under Multiple Award IQC - Does Not Involve Past Performance Eval.

PARTIAL ORAL PRESENTATION

- Marine Corps Aviation Simulator Master Plan Program
  - Significant Impact on Acquisition
  - Written Portion
    - Technical (Design and ILS)
    - Past Performance
    - Cost

PARTIAL ORAL PRESENTATION

- Oral Presentation
  - Program Management
    - Integrated Product Team
      - Structure
      - Charter
    - Risk Management Plan
    - Earned Value Management
- Use of Government and Contractor Resources
- Production Capability and Capacity

MARINE CORPS SAMPLE CLARIFICATION QUESTIONS

- Please explain what information and or resources would be required from Lockheed to successfully execute this program.
- What proprietary information is resident in LM-Core? What impact, if any, will this have on the ability of the government to effect future modifications and maintenance on the trainer by government or a third party contractor?
- Please explain how you intend to execute the program management function from Orlando? How and where does the government program manager map into your IPT structure?

F-14B & F-14D UPGRADE SAMPLE CLARIFICATION QUESTIONS

- Please explain how you intend to achieve calligraphic target correlation with existing sensor systems.
- Please expand on how diagnostics will be performed.
- Will there be a formal Test Plan? Is the Plan a deliverable under the contract? If so, will the Government have an input into the Plan and Procedures?
- Please expand on what the training course entails including the ratio between classroom and practical application segements.

ORAL PRESENTATION

- Advantages
  - Opportunity to Listen to Direct Project Personnel vice Proposal Writers
  - Project Overview
  - Clarify Critical Issues Without Entering Into Discussions
  - Number of Evaluation Notices Reduced
  - Evaluation Process is Significantly Reduced – Government Costs Reduced
  - Proposal Prep Cost May be Reduced
  - Can Significantly Reduce the Time of Award
  - May be Able to Award W/O Discussions

ORAL PRESENTATION

- Disadvantages
  - Different Type of Effort for Both the Government and Contractor
  - Conflicting/Overlapping Information With Written Proposal? Additional Time/Effort
  - Sway Opinion on Contractor?
  - Limited Government Audience
  - Some Question as to What the Government is Truly Acquiring

EXPERIENCES/LESSONS LEARNED

- Do Not Use if You Anticipate a Large Number of Proposals
  - Tracking Becomes Unwieldy
  - Attention Span Difficult For Evaluators
- Allow too Much Time the Process Becomes Tenuous - e.g., Army allowed 2 Days
- Do Not Mandate Inflexible Clarification Process

EXPERIENCES/LESSONS LEARNED

- Personnel Must Be Committed To Process (i.e Attend ALL Sessions)
- Evaluators Must be Quick Thinkers
  - Assimilate Data in Real-Time
  - Understand Issues – Know the RFP
  - Ask Meaningful Clarification Questions
- Engineers Have Some Reservations With Lower Level of Detail
- Allow Sufficient Proposal Preparation Time

EXPERIENCES/LESSONS LEARNED

- Control Content - If Massive Technical Detail Required, Use Written Proposals
- Prepare Evaluation Findings Immediately Following Each Offeror’s Presentation
- Assure Contractor Has Key Contractor and Sub-Contractor Personnel Present
- Assure Contractor has Firm Sub-Contractor Commitments

AWARD

- **<u>GOAL FOR NAWCTSD</u>:**
  - Award Without Discussions
  - Top Level Design - Should Not Expect Significant Detail (Reduces Chance For Deficiencies)
  - Clarification Process Should Eliminate Most Problems & Confusion

KEEP IN MIND

- Ground Rules
- Introductions
- Conference Room Setup
- 2 Clocks and Stop Watch
- Be Careful of the Good Jobs

THE END